

- **General**

- Full name, social security number, and date of birth of taxpayer, spouse, and all dependents.
- Bank account information for direct deposit of tax refunds and payment of all taxes.
- Prior year tax return (first year clients only).
- Settlement statements for any real estate transaction - purchase, sale or refinance.

- **Income**

- W-2's
- Final paystub of year.
- 1099-INT – Interest income
- 1099-DIV – Dividend income
- 1099-B – stock transactions.
- 1099-R's for retirement plan/pension distributions.
- 1099-SSA's for social security benefits.
- 1099-G's for state tax refunds, unemployment benefits.
- W-2G's for gambling winnings.
- K-1's from S-corporations, partnerships, trusts.

- **Deductions**

- Form 1098 - mortgage interest on real estate.
- Form 1098 – interest on new vehicle purchase.
- New vehicle purchase document.
- Real estate taxes.
- Personal property tax (ad valorem) on automobiles, boats, etc.
- Charitable contributions - cash and non-cash.
- Medical expenses.
 - Individual insurance premiums.
 - Form 1095-A - Marketplace insurance.
 - Prescription drugs.
 - Doctor, dental, hospital, etc.

- **Adjustments/credits**

- Form 1098-T - higher education expenses.
- Form 1098-E - student loan interest.
- Form 5498 - IRA contributions.
- Form 5498-SA – HSA contributions.
- Form 1099-SA – HSA distributions.
- 529 plan contributions.
- Educator expenses.
- Child care expenses.
 - Amount paid.
 - Provider name, address, tax ID#.
- Estimated tax payments.

- **Business**

- See separate Business Summary

- **Rental property**

- Settlement statement from purchase.
- See separate Rental Summary.